

BOOK PUBLISHERS, AUSTRALIA, 1994

This publication presents the results of a data collection from book publishers which employed staff and were predominantly engaged in book publishing in 1994.

Information was collected on the financial and employment data of the organisations included in the collection as well as information on the numbers of books published and sold by type.

MAIN FEATURES

The collection covered 186 organisations which employed staff and were predominantly engaged in book publishing. In 1994, these organisations:

- generated \$1,156.7 million in turnover, of which \$841.7 million was from sales of books;
- paid out \$212.8 million in wages and salaries to their own employees and outlayed \$63.4 million on royalties and fees, \$209.8 million on printing, \$173.0 million on imports and \$138.4 million on advertising, promotion and distribution;
- employed 4,564 full-time and 364 part-time permanent employees, whilst 613 persons were employed on a non-permanent basis. Almost 61% of persons employed were female;
- sold \$487.7 million worth of Australian titles, out of total book sales of \$841.7 million;
- exported \$81.1 million worth of books, of which \$30.2 million was to North America; and
- sold approximately 125 million books and published almost 13,750 titles.

SUMMARY OF FINDINGS

INDUSTRY STRUCTURE

The twenty largest publishers in terms of total turnover, earned \$888.2 million or 76.8% of the total and incurred costs of \$780.1 million (77.9%).

MAJOR DATA ITEMS BY TURNOVER SIZE, AUSTRALIA, 1994

Data items	Unit	Businesses ranked by total turnover		
		Largest twenty	Remainder	Total
Number of organisations	No.	20	166	186
Sales of books	\$m	621.4	220.3	841.7
Sales of other products	\$m	235.7	24.3	260.0
Total turnover	\$m	888.2	268.5	1,156.7
Average turnover per business	\$m	44.4	1.6	6.2
Wages and salaries paid	\$m	168.6	44.2	212.8
Royalties and fees paid	\$m	42.0	21.4	63.4
Total costs	\$m	780.1	221.1	1,001.2
Average costs per business	\$m	39.0	1.3	5.4
Opening stocks	\$m	182.9	55.9	238.8
Closing stocks	\$m	183.9	61.4	245.3
Stocks to book sales ratio	%	29.6	27.9	29.1
Sales of Australian titles	\$m	318.8	168.9	487.7
Royalties and fees paid per Australian book sales	%	13.2	12.7	13.0
Employment — males	No.	1,617	548	2,165
Employment — females	No.	2,500	876	3,376
Persons working per business	No.	205.9	8.6	29.8
Wages and salaries per person employed	\$'000	41.0	31.0	38.4
Operating profit before tax	\$m	109.2	52.9	162.1
Profit margin	%	12.3	19.7	14.0

INQUIRIES

- for more information about statistics in this publication and the availability of related unpublished statistics, contact Roger Mableson on Adelaide (08) 237 7449 or any ABS State Office.
- for information about other ABS statistics and services please contact Information Services on Canberra (06) 252 6627, 252 5402, 252 6007 or any ABS State Office.

TURNOVER

Sales of books accounted for \$841.7 million (72.8%) and other products for \$260.0 million (22.5%), out of total turnover of \$1,156.7 million during 1994.

COMPONENTS OF TURNOVER, AUSTRALIA, 1994

Item	Total \$m
Sales of all books ¹	841.7
Sales of other products	260.0
Receipts from royalties/sales of rights	5.2
Government grants and subsidies ²	16.7
Public Lending Right payments	0.6
Copyright Agency Limited payments ³	2.7
Other income	29.8
Total	1,156.7

¹ Net of trade, quantity or cash discounts.

² Book bounties, Export Market Developments Grants, etc.

³ Excludes payments to authors.

DOMESTIC AND EXPORT SALES OF BOOKS

In the domestic market, the highest value sales, in order, were for non-fiction hardback, fiction paperback and non-fiction paperback. In the export market, non-fiction hardback was again the largest, but primary education was the second largest, whereas it was only the seventh largest in the domestic market.

SALES OF BOOKS¹ BY CATEGORY AND DESTINATION, AUSTRALIA, 1994

Category of book	Domestic sales \$m	Export sales \$m	Re-export sales \$m	Total \$m
Education				
Primary	60.3	15.7	—	76.1
Secondary	72.9	4.2	0.4	77.5
Tertiary education	83.8	2.7	2.7	89.3
Professional and reference	83.6	14.7	0.9	99.1
Total education	300.6	37.4	4.0	342.0
General hardback				
Non-fiction	127.5	19.1	0.7	147.3
Fiction	24.7	21.4	n.p.	26.1
Children's	53.9	23.3	n.p.	57.1
Total hardback	206.0	23.6	0.9	230.5
General paperback				
Non-fiction	102.3	210.3	n.p.	112.5
Fiction	114.1	2.0	1.0	117.1
Children's	34.6	21.9	n.p.	36.5
Total paperback	251.0	14.0	1.1	266.2
Electronic	3.0	—	—	3.0
Total	760.6	75.1	6.0	841.7

¹ Includes all books whether published by the business or not.

² Sum of export sales and re-export sales.

Over 80% of exports were to three major markets, North America, \$30.2 million, United Kingdom/Europe, \$19.0 million and New Zealand, \$17.1 million.

EXPORT SALES¹ OF BOOKS BY REGION/COUNTRY OF DESTINATION, AUSTRALIA, 1994

Region/country	\$m	%
UK/Europe	19.0	23.4
North America	30.2	37.2
Asia ²	5.2	6.4
New Zealand	17.1	21.1
PNG, Fiji and Pacific countries and territories	4.3	5.3
South Africa	0.7	0.8
Other ³	4.7	5.8
Total	81.1	100.0

¹ Includes re-exports.

² Markets most frequently specified were Singapore, Hong Kong, Malaysia and Japan.

³ Markets most frequently specified were Mexico, Canada, West Indies, South America and the Middle East.

COSTS

Wages and salaries paid to the book publishers' own employees accounted for \$212.8 million (21.3%) of total operating costs, closely followed by costs of printing of \$209.8 million (21.0%).

COMPONENTS OF OPERATING COSTS, AUSTRALIA, 1994

Cost item	Total \$m
Wages and salaries paid to own employees	
Artists, designers, illustrators	6.8
Editors	27.1
Publishers	15.0
Typesetters	6.4
All other wages and salaries	157.5
Total wages and salaries	212.8
Royalties and fees paid to	
Authors	45.0
Artists, designers, illustrators	9.3
Editors	4.1
Publishers	2.9
Other	2.1
Total royalties and fees paid	63.4
Costs of printing done	
In Australia	143.1
Overseas	66.7
Total costs of printing done	209.8
Landed costs of books imported	173.0
Advertising and promotional costs	
In Australia	45.7
Overseas	2.4
Total advertising and promotional costs	48.2
Distribution and other marketing costs	
In Australia	86.1
Overseas	4.2
Total distribution and other marketing costs	90.3
Other costs	203.1
Total	1,001.2

NUMBER AND SALES VALUE OF BOOKS PUBLISHED AND IMPORTED

The number of books sold which were published or co-published by businesses in the collection, totalled nearly 73 million for a value of \$491.7 million. Just under 52 million books, which had been imported by publishers, were sold for \$350.0 million. The average price per book sold ranged from \$13.80 for tertiary education books to \$2.60 for hardback children's titles.

For books published by the business, primary education, non-fiction hardback and non-fiction paperback each had sales of over 10 million books. Different patterns emerged for imported books, with nearly 18 million hardback children's books sold followed by 12.6 million paperback fiction. There were much smaller numbers of imported education books.

NUMBER AND SALES OF BOOKS PUBLISHED, CO-PUBLISHED AND IMPORTED BY CATEGORY, AUSTRALIA, 1994

	Number published by the business	Number imported	Total <hr/> Number	Sales	Average per book
Category of book	million	million	million	\$m	\$
Education					
Primary	12.0	1.6	13.6	74.1	5.5
Secondary	4.5	1.0	5.6	76.1	13.7
Tertiary	4.7	1.7	6.4	88.2	13.8
Professional and reference	8.9	1.2	10.1	99.3	9.9
Total education	30.1	5.5	35.6	337.7	9.5
General hardback					
Non-fiction	12.3	5.0	17.3	138.7	8.0
Fiction	n.p.	n.p.	4.7	25.1	5.4
Children's	3.4	17.8	21.3	54.6	2.6
Total hardback	n.p.	n.p.	43.2	218.4	5.1
General paperback					
Non-fiction	10.8	5.4	16.2	116.2	7.2
Fiction	4.0	12.6	16.6	111.1	6.7
Children's	6.5	3.4	9.9	36.3	3.7
Total paperback	21.2	21.5	42.7	263.7	6.2
Electronic	n.p.	n.p.	0.3	3.0	10.8
Total	70.0	51.8	121.8	822.9	6.8
Books co-published	12.9	..	2.9	18.9	6.5
Total	72.9	51.8	124.8	841.7	6.7

1 Includes those co-published with overseas publisher.

NUMBER OF TITLES PUBLISHED

Of the 13,741 titles published during 1994, Professional and reference accounted for 4,813 titles, Secondary education for 2,338 and Primary education for 2,313, followed by non-fiction paperback with 1,244.

NUMBER OF TITLES PUBLISHED¹ BY CATEGORY, AUSTRALIA, 1994

Category of book	Total
Books published by the business	
Education	
Primary	2,313
Secondary	2,338
Tertiary	735
Professional and reference	4,813
Total education	10,199
General hardback	
Non-fiction	519
Fiction	n.p.
Children's	208
Total hardback	n.p.
General paperback	
Non-fiction	1,244
Fiction	575
Children's	457
Total paperback	2,276
Electronic	n.p.
Total books published	13,412
Books co-published by the business	
With other Australian publisher	23
With overseas publisher	306
Total books co-published	329
Total	13,741

¹ During the reporting period.

EMPLOYMENT

There were 4,564 persons employed as full-time permanent employees during the last pay period ending in December 1994. Of these, 1,929 were males and 2,635 females. An additional 364 persons were employed permanently on a part-time basis and 613 persons on a casual basis.

PERSONS WORKING, AUSTRALIA, DECEMBER 1994

Employment type	Males	Females	Total
	no.	no.	no.
Permanent			
Full-time	1,929	2,635	4,564
Part-time	68	296	364
Casual	168	445	613
Total	2,165	3,376	5,541

EXPLANATORY NOTES

SCOPE AND COVERAGE

1 The coverage of the collection consisted of all public and private businesses in Australia employing staff and which were recorded on the ABS Business Register with a predominant activity of book publishing. Any book publishing businesses not employing staff in 1994 were excluded. It is assumed that businesses which do not employ staff contribute only a relatively small proportion of the total economic activity and their exclusion would not have a significant impact on the published data.

2 Approaches were made to approximately 500 businesses which had been identified as potential respondents from the ABS Business Register and the Australian Book Publishers Association Directory of members. Those subsequently excluded were mostly businesses whose predominant activity was non-book publishing activities such as magazine publishing and book distribution.

3 Businesses were asked to report for Australian-based activities, i.e. domestic operations, exports of goods or services from Australia and imports of goods and services into Australia by the Australian branches of the business.

CLASSIFICATION BY INDUSTRY

4 The industry classification used in this publication is the Australian and New Zealand Standard Industrial Classification (ANZSIC). Each business unit is classified to a single industry class based on the activity which provides the main source of income of the business. Businesses included have been classified to the ANZSIC Industry Class 2423 Book and Other Publishing which consists of units mainly engaged in publishing books, sheet music, maps or other printed articles.

RELATED PUBLICATIONS

5 Other ABS publications which may be of interest include:

Manufacturing Industry, Australia, 1992-93 (8221.0)

6 Current publications produced by the ABS are listed in the *Catalogue of Publications and Products, Australia* (1101.0). The ABS also issues a *Release Advice* (1105.0) on Tuesdays and Fridays which lists publications to be released in the next few days. The Catalogue and Release Advice are available from any ABS office.

UNPUBLISHED STATISTICS

7 As well as the statistics included in this and related publications, the ABS may have other relevant unpublished data available. Inquiries should be made to the contact in the Inquiries box on the front page.

SYMBOLS AND OTHER ABBREVIATIONS

The following symbols, where shown in columns of figures or elsewhere in tables mean:

- nil or rounded to zero
- .. not applicable
- n.p. not available for separate publication, but data included in totals where applicable

Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

W. McLennan
Australian Statistician

